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ARIZONA LABOR MARKET INFORMATION

NEWSLETTER

Vol. XVI No. 3
March 1992

Unemployment Rate

Seasonally Adjusted
January*

ARIZONA	–	9.3%
Maricopa Co.	–	8.3
Pima Co.	–	6.5
United States	–	7.1

Consumer Price Index

U.S. – January 1992
Base = 1982-84

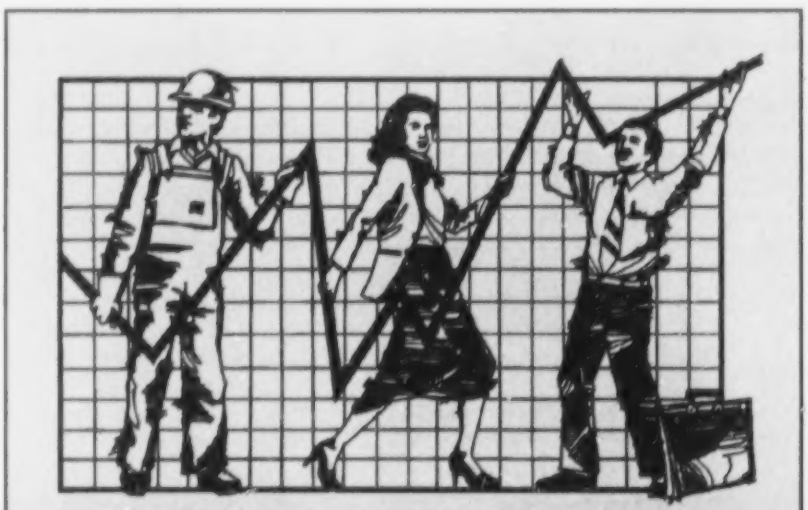
Wage Earner/Clerical Worker	–	136.0
% Chg. Year Ago	–	2.4
All Urban	–	138.1
% Chg. Year Ago	–	2.6

Phoenix – 4th Qtr 1990
Base = 1982-84

All Urban	–	138.4
% Chg. Year Ago	–	2.3

Tucson CPI No Longer Available (see May 1991 *Arizona LMI Newsletter*

* Preliminary



Forecast Update

'92-'93

Research Administration Issues
Two-Year Employment Projections

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Arizona Department of Economic Security
— Moving People Toward Self-Sufficiency

State Expected to Grow Modestly Over Next 2 Years

Note: In late February each year, the Arizona Department of Economic Security's Research Administration (RA) issues a two-year forecast of labor force, employment, and unemployment for the state and its three major substate regions — Maricopa and Pima counties, and the non-metropolitan counties as a whole.

The forecast's results and an analysis are published in the March issue of the Arizona Labor Market Information Newsletter. Then, six months later the forecast is updated to reflect new economic data and is detailed in the September Arizona LMI Newsletter.

Arizona

Arizona's economy slowed substantially in 1991, but the state still managed to end the year with positive wage and salary job growth. But while non-farm payroll jobs grew 0.8 percent on an annual-average basis, it was the worst showing since 1982 when the number of wage and salary jobs decreased 1.1 percent.

The state's anemic job growth can be attributed to a national recession that has eroded consumer confidence, depressed retail sales, slowed orders for durable goods, and led to stagnant investment in non-residential construction. However, it appears the worst of the recession's effects in Arizona is over.

The Arizona Department of Economic Security s Research Administration (RA) forecasts very modest job growth for the first half of 1992 with more robust growth occurring in the last two quarters of the year. RA's forecast for 1993 calls for continued improvement, but the rate of job growth will likely be below rates of the mid-1980s. Non-farm payroll employment is expected to grow 2.0 percent in 1992, followed by a 2.8 percent rise in 1993.

The major industry groups of manufacturing; construction; transportation, communications, and public utilities (TCPU); and finance, insurance, and real estate (FIRE) all experienced job declines in Arizona last year. And RA's forecast for 1992 calls for continued employment declines in the manufacturing and construction sectors with both industries having modest growth in 1993. All other major industry groups in Arizona are expected to have job growth in both years.

Arizona's manufacturing industries will be the slowest to recover, as continued cutbacks in defense spending will make it difficult for durable goods manufacturers to increase production and employment. Durable-goods manufacturers, especially those in the high-tech industries, are forecast to continue to pare employment as they restructure to become more competitive. Arizona's manufacturing employment is expected to decline 2.1 percent (3,700 jobs) in 1992, before growing 0.6 percent (1,100 jobs) in 1993.

The state's construction industry had another disappointing year in 1991 as employment fell 5,200. General construction, heavy construction, and special trades all lost employment in 1991. Special trades employment is expected to show improvement in 1992, but continued job losses in general and heavy construction will result in an overall loss of 500 construction jobs. In 1993, construction are projected to add 900 positions with all three subindustries having positive growth.

Mining will continue to add jobs in both 1992 and 1993 with all of the growth occurring in the copper mining industry. The balance of the mining industries as a group will experience modest employment losses in both forecast years.

Services Expected to Rebound

Between 1983 and 1990, Arizona's service industries created more than 20,000 new jobs a year, before "slipping" to gains of 13,400 in 1990 and 10,900 last year. For the next two years, services is expected to make some improvement, but job growth will continue to be below the 20,000 mark. RA projects services will create 15,100 jobs in 1992 and 17,000 in 1993. The catch-all category of "other services" — which includes, among other sectors, legal services and personnel services — is expected to lead the way, adding 4,800 jobs in 1992 and 6,000 in 1993.

Like services, trade has had weaker-than-normal growth in the 1990s. Trade grew by less than two percent in both 1990 and 1991, compared to growth rates of three-plus percent following the recessionary year of 1982. RA's forecast calls for trade's rate of growth to improve to 2.2 percent in 1992 and 2.5 percent in 1993, but this is still well below the long-term average gain. Contributing to trade's

U.S. Economy Will Influence Arizona's Fate

Research Administration's two-year employment and labor market forecasts are primarily a product of the Arizona Employment Forecasting Model (AEFM), a 250-equation econometric model that simulates the economies of Arizona and its substate regions.

Input into the model are statewide employment, unemployment, and population data, as well as forecasts of national economic variables (e.g., interest rates, inflation) that will likely affect job growth nationally and in Arizona. Research Administration (RA) uses U.S. economic forecasts derived by The WEFA Group (formerly Wharton Econometric Forecasting Associates), a Pennsylvania-based national forecasting organization.

One of the major indicators of where the nation's and Arizona's economies are headed is U.S. real gross domestic product (GDP). And WEFA expects GDP, which measures economic activity within the U.S. borders, to grow

(Continued on page 13)

growth are expected job gains in wholesale trade, automotive and service stations, and eating and drinking establishments.

TCPU Expected to Recover Slowly

The major industry group of transportation, communications, and public utilities (TCPU) lost 1,300 jobs in 1991. All of the loss was due to the communications and public utilities industries. Surprisingly, despite major job losses in the air-transportation sector, transportation overall had a modest employment increase in 1991. This follows more substantial gains in prior years. Modest job growth is forecast to continue in the transportation industry the next two years, while employment losses are expected in the communications and public utilities sectors in 1992, before turning positive in 1993. Overall, TCPU will probably grow at a rate of 1.2 percent in 1992 and 1.4 percent in 1993.

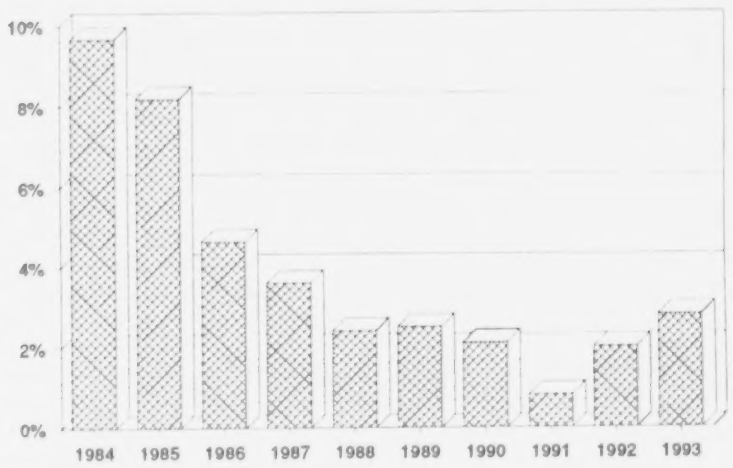
Employment in the finance, insurance, and real estate (FIRE) group declined 1.5 percent in 1991 with most of the decline occurring in the finance sector. The forecast for 1992 calls for improved growth in the insurance and real estate sectors, and continued losses in the finance industry. Overall, FIRE should gain 300 jobs this year. For 1993, continued improvement in the insurance and real estate sectors, as well as in the finance sector, is forecast to result in 1,700 additional FIRE jobs.

Government, meanwhile, is projected to add the second greatest number of jobs for all major industry groups in Arizona — 9,700 in 1992 and 10,300 in 1993. Increases in school employment are expected to account for approximately two-thirds of this growth.

Finally, Arizona's unemployment rate is expected to climb to an average rate of 6.3 percent in 1992 after posting a 5.6 percent rate in 1991. The U.S. unemployment rate in 1991 averaged 6.8 percent. Causing the higher Arizona unemployment rate is expected faster growth in total unemployment than total employment. For 1993, a

Figure 1

Arizona Wage and Salary Employment Growth Rates, Actual (1984-1991) and Projected (1992, 1993)



Source: Arizona Dept. of Economic Security, Research Administration, February 1992

Table 1

Arizona Labor Force, Employment, and Unemployment Data and Growth Rates, Actual (1991) and Projected (1992, 1993)

(in Thousands)

	1991	Growth Rate	1992	Growth Rate	1993	Growth Rate
Labor Force	1,704.0	-1.3%	1,752.3	2.8%	1,797.1	2.6%
Unemployment	96.0	4.3%	109.9	14.5%	105.2	-4.3%
Unemployment rate	5.6%		6.3%		5.9%	
Total Employment	1,608.0	-1.6%	1,642.4	2.1%	1,691.9	3.0%
Total Wage and Salary Employment[a]	1,497.6	0.8%	1,528.2	2.0%	1,570.9	2.8%
Manufacturing	176.5	-4.9%	172.8	-2.1%	173.9	0.6%
Mining	13.6	7.9%	14.2	4.4%	14.9	4.9%
Construction	77.5	-6.3%	77.0	-0.6%	77.9	1.2%
TCPU[b]	80.8	-1.6%	81.9	1.4%	83.0	1.3%
Trade	373.3	1.4%	381.5	2.2%	391.2	2.5%
FIRE[c]	92.7	-1.5%	93.0	0.3%	94.7	1.8%
Services	412.0	2.6%	427.1	3.7%	444.1	4.0%
Government	271.2	4.7%	280.9	3.6%	291.2	3.7%

Notes: a) Industry totals may not add up correctly due to rounding; excludes agricultural employment
b) Transportation, communications, and public utilities
c) Finance, insurance, and real estate

Source: Arizona Dept. of Economic Security, Research Administration, February 1992

decline in total unemployment will help drop the state's unemployment rate to 5.9 percent.

In conclusion, the near-term outlook for Arizona's economy remains positive. While the national recession has certainly had its negative impact in Arizona, it's some solace to note that the state continued to create jobs in 1991, however modest the growth. And with the national econot. y beginning to show signs of life in the early part of 1992, it's expected that Arizona's economy will be well into recovery by 1993.

Maricopa County

Non-farm wage and salary employment in Maricopa County declined 0.1 percent in 1991, resulting in a loss of 900 positions. This was the first drop in non-farm payroll jobs since 1982 when there was also a 0.1 percent decline.

As in 1982, the manufacturing and construction industries were responsible for most of the county's job losses last year. Other major industry groups to experience job losses in 1991 were transportation, communications, and public utilities (TCPU); and finance, insurance, and real estate (FIRE).

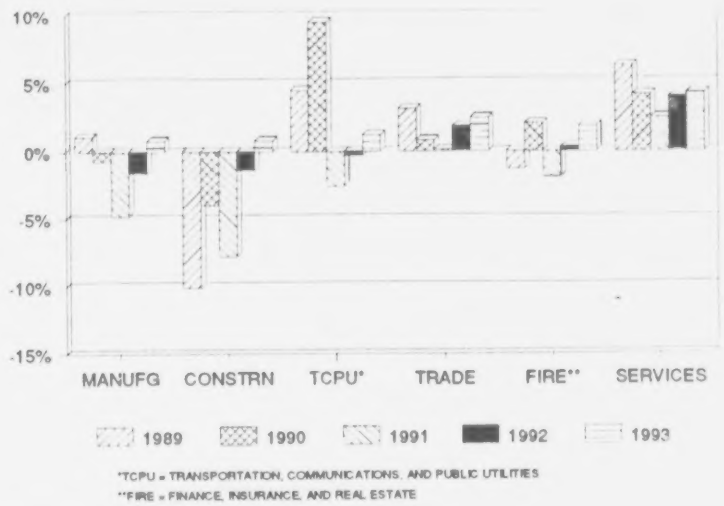
The outlook for Maricopa County employment in 1992 is for continued weakness in manufacturing, construction, and TCPU, with a modest gain expected in FIRE. By 1993, all of Maricopa County's major industry groups are expected to experience positive growth.

RA forecasts manufacturing will lose 2,100 jobs in 1992 before adding 1,000 new positions in 1993. Within manufacturing, durable-goods industries are forecast to continue to experience employment declines as defense-related cutbacks march forward.

Job losses in construction will slow considerably in 1992 with only 700 jobs expected to be lost compared to the 4,300 cut in 1991. By 1993, Arizona's construction industry is expected to show positive growth, adding 400 new jobs.

Figure 2

Maricopa County Wage and Salary Employment Growth Rates, by Selected Major Industry Groups, Actual (1984-1991) and Projected (1992, 1993)



Source: Arizona Dept. of Economic Security, Research Administration, February 1992

Table 2

Maricopa County Labor Force, Employment, and Unemployment Data and Growth Rates, Actual (1991) and Projected (1992, 1993)

(in Thousands)

	1991	Growth Rate	1992	Growth Rate	1993	Growth Rate
Labor Force	1,054.8	-2.4%	1,077.7	2.2%	1,102.2	2.3%
Unemployment	51.4	10.5%	57.0	10.9%	53.4	-6.3%
Unemployment rate	4.9%		5.3%		4.8%	
Total Employment	1,003.4	-3.0%	1,020.7	1.7%	1,048.8	2.8%
Total Wage and Salary Employment[a]	984.3	-0.1%	1,001.6	1.8%	1,028.5	2.7%
Manufacturing	132.2	-4.8%	130.1	-1.6%	131.1	0.8%
Mining	0.7	-12.5%	0.7	0.0%	0.7	0.0%
Construction	51.1	-7.8%	50.4	-1.4%	50.8	0.8%
TCPU[b]	57.3	-2.6%	57.1	-0.3%	57.8	1.2%
Trade	247.9	0.1%	252.3	1.8%	258.4	2.4%
FIRE[c]	74.0	-1.9%	74.2	0.3%	75.5	1.8%
Services	280.6	2.4%	291.6	3.9%	303.8	4.2%
Government	140.5	4.4%	145.1	3.3%	150.4	3.7%

Notes: a) Industry totals may not add up correctly due to rounding; excludes agricultural employment
b) Transportation, communications, and public utilities
c) Finance, insurance, and real estate

Source: Arizona Dept. of Economic Security, Research Administration, February 1992

TCPU is expected to drop 200 positions in 1992 as losses in the communications and public utilities sectors slow. Positive job growth is forecast for 1993. The transportation sector are projected to show modest job growth in both forecast years.

FIRE lost 1,400 jobs in 1991, primarily due to losses in the finance sector. FIRE, however, are forecast to add 200 jobs in 1992 and 1,300 positions in 1993 as the result of both moderately strong job gains in the insurance and real estate sectors the next two years and the end of finance sector losses by 1993.

Trade, services, and government will continue to create the most jobs in Maricopa County. These three industries account for more than two-thirds of the county's non-farm wage and salary jobs and will continue to generate the most employment opportunities.

Trade is expected to add 4,400 positions in 1992 and 6,100 jobs in 1993. Services employment is projected to increase by 11,000 in 1992 and 12,200 in 1993. And government is forecast to have job gains of 4,600 in 1992 and 5,300 in 1993.

The unemployment rate in Maricopa County increased six-tenths of a percentage point in 1991 to 4.9 percent (on an annual-average basis). RA's forecast calls for the county's unemployment rate to climb an additional four-tenths of a percentage point in 1992 to 5.3 percent. And improved employment opportunities in 1993 will help to lower the annual rate to 4.8 percent.

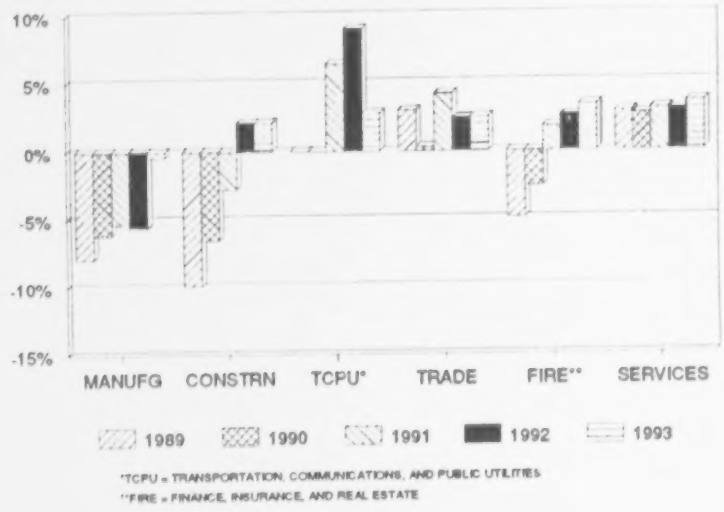
Pima County

All of Pima County's major industry groups, except manufacturing, are projected to experience positive job growth in both 1992 and 1993. Pima County added 6,900 non-farm wage and salary jobs in 1991 and is projected to add another 7,100 in 1992 and 8,100 in 1993.

Manufacturing employment in Pima County is expected to suffer from the same defense-related cutbacks that will stunt growth in Maricopa County. As is the

Figure 3

Pima County Wage and Salary Employment Growth Rates, by Selected Major Industry Groups, Actual (1984-1991) and Projected (1992, 1993)



Source: Arizona Dept. of Economic Security, Research Administration, February 1992

Table 3

Pima County Labor Force, Employment, and Unemployment Data and Growth Rates, Actual (1991) and Projected (1992, 1993)

(in Thousands)

	1991	Growth Rate	1992	Growth Rate	1993	Growth Rate
Labor Force	311.7	0.6%	321.7	3.2%	333.5	3.7%
Unemployment	12.2	-5.4%	14.0	14.8%	14.3	2.1%
Unemployment rate	3.9%		4.4%		4.3%	
Total Employment	299.5	0.9%	307.7	2.7%	319.2	3.7%
Total Wage and Salary Employment[a]	259.0	2.7%	266.1	2.7%	274.2	3.0%
Manufacturing	24.8	-5.3%	23.4	-5.6%	23.3	-0.4%
Mining	2.3	4.5%	2.4	4.3%	2.5	4.2%
Construction	14.1	-2.8%	14.4	2.1%	14.7	2.1%
TCPU[b]	10.0	6.4%	10.9	9.0%	11.2	2.8%
Trade	61.6	4.2%	63.1	2.4%	64.7	2.5%
FIRE[c]	11.6	1.8%	11.9	2.6%	12.3	3.4%
Services	75.6	3.1%	77.9	3.0%	80.7	3.6%
Government	59.0	5.5%	62.2	5.4%	64.8	4.2%

Notes: a) Industry totals may not add up correctly due to rounding; excludes agricultural employment
b) Transportation, communications, and public utilities
c) Finance, insurance, and real estate

Source: Arizona Dept. of Economic Security, Research Administration, February 1992

case in the Phoenix metro area, durable goods will be the hardest hit manufacturing sector in Pima County.

The construction industry, which lost 400 jobs in 1991, is expected to add 300 new positions in both 1992 and 1993. Construction and manufacturing were the only two industries in Pima County to lose employment in 1991.

RA's forecast calls for the rest of the major industry groups in Pima County to experience positive growth in both 1992 and 1993. Government, services, and trade will add the most new positions over the forecast period..

Total unemployment is expected to increase by 1,800 in 1992 and 300 in 1993 after dropping by 700 in 1991. RA's forecast calls for Pima County's unemployment rate to increase from 3.9 percent in 1991 to 4.4 percent in 1992. Faster growth in total employment than total unemployment will lead to a slightly improved jobless rate of 4.3 percent in 1993.

Non-metropolitan Counties

All of the state's rural counties — except Apache, Cochise, La Paz, and Navajo — had higher levels of non-farm wage and salary employment in 1991. Mohave, Yuma, and Yavapai counties added the most payroll jobs, increasing by 1,575, 1,175, and 1,100, respectively. While Mohave County added the most wage and salary jobs, on the strength of its mining industry Greenlee County had the highest job-growth rate, increasing by 12.3 percent (375 jobs).

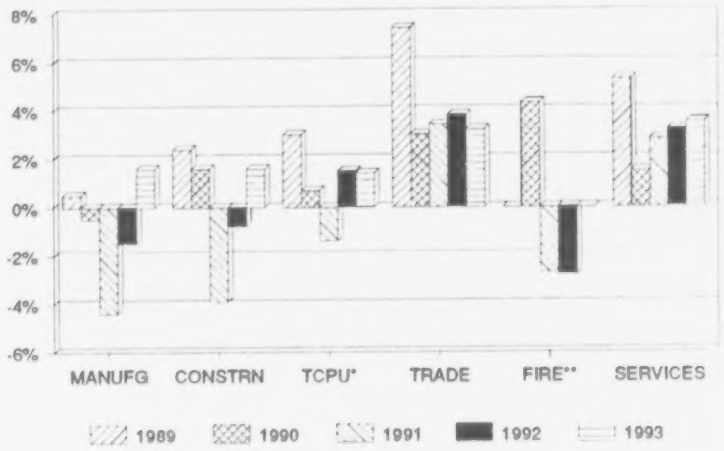
As for the upcoming two-year period, wage and salary employment in Arizona's non-metropolitan counties as a whole will continue to show strength. Payroll jobs in the rural counties are expected to grow in both the 1992 and 1993 forecast years, increasing by rates of 2.4 percent (6,200 jobs) and 2.9 percent (7,600 jobs), respectively.

As is the case in Maricopa and Pima counties, the trade, services, and government industries are expected to create the most

(Continued on page 13)

Figure 4

Non-metropolitan Counties' Wage and Salary Employment Growth Rates, by Selected Major Industry Groups, Actual (1984-1991) and Projected (1992, 1993)



Source: Arizona Dept. of Economic Security, Research Administration, February 1992

Table 4

Non-metropolitan Counties' Labor Force, Employment, and Unemployment Data and Growth Rates, Actual (1991) and Projected (1992, 1993)

(in Thousands)

	1991	Growth Rate	1992	Growth Rate	1993	Growth Rate
Labor Force	337.5	0.5%	352.9	4.6%	361.3	2.4%
Unemployment	32.4	-0.6%	38.9	20.1%	37.5	-3.6%
Unemployment rate	9.6%		11.0%		10.4%	
Total Employment	305.1	0.7%	314.0	2.9%	323.8	3.1%
Total Wage and Salary Employment[a]	254.3	2.4%	260.5	2.4%	268.1	2.9%
Manufacturing	19.5	-4.4%	19.2	-1.5%	19.5	1.6%
Mining	10.6	10.4%	11.1	4.7%	11.6	4.5%
Construction	12.3	-3.9%	12.2	-0.8%	12.4	1.6%
TCPU[b]	13.5	-2.9%	13.8	2.2%	14.0	1.4%
Trade	63.8	3.6%	66.1	3.6%	68.2	3.2%
FIRE[c]	7.1	-2.7%	6.9	-2.8%	6.9	0.0%
Services	55.8	2.8%	57.6	3.2%	59.6	3.5%
Government	71.7	4.7%	73.6	2.6%	75.9	3.1%

Notes: a) Industry totals may not add up correctly due to rounding; excludes agricultural employment
b) Transportation, communications, and public utilities
c) Finance, insurance, and real estate

Source: Arizona Dept. of Economic Security, Research Administration, February 1992

The Arizona Labor Force in January

Arizona's seasonally adjusted unemployment rate climbed for the ninth consecutive month in January, jumping nine-tenths of a percentage point to 9.3 percent from December's revised rate of 8.4 percent. Arizona's rate, which has not been at that level or above since July 1983, has doubled from 4.6 percent in April 1991.

As might be expected, the state's two major metropolitan areas had sizable unemployment rate increases. The Phoenix metro area's rate rose to 8.3 percent in January from a revised 7.2 percent in December, while the Tucson area's rate jumped from a revised 5.5 percent rate in December to 6.5 percent in January.

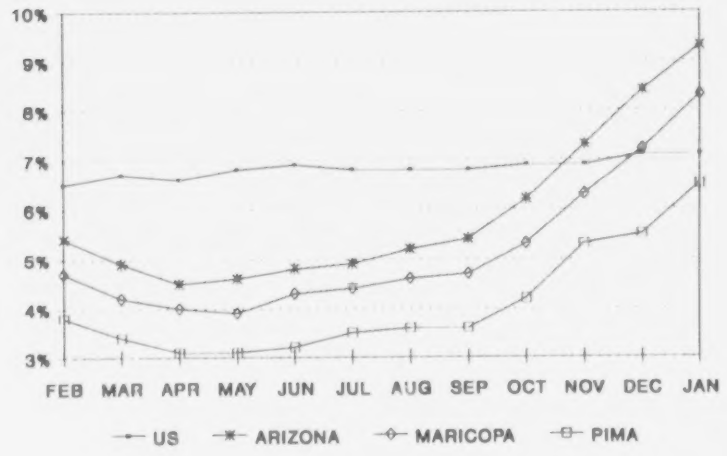
Total unemployment in January surged by 18,100 to 149,400. Driven by a three-month influx of new entrants and re-entrants into the labor force, more Arizonans were unemployed than anytime since March 1983. Unemployment peaked after the 1982 recession in February 1983, reaching 165,500. Even when Arizona suffered its historical high unemployment rate of 13.6 percent in June 1975, only 132,100 were unemployed.

Total employment's decline of only 14,700 was not a large amount compared to other January declines during the last 10 years. Were it not for the labor force increase, the seasonally adjusted rate would not have risen so dramatically. Arizona's unadjusted unemployment rate was 8.6 percent, up a percentage point from December's rate.

In January, non-farm payroll employment decreased by another 31,300 jobs, or 2 percent, about average for December to January during the last 10 years. Due to school declines, government employment was down 11,400 jobs from December, a little less than the 10-year average. Retail trade was down 10,100, although that 3.3 percent drop was about equal to the 10-year average loss.

Figure 1

U.S., Arizona, Maricopa County, and Pima County Unemployment Rates (Seasonally Adjusted), February 1991-January 1992



Source: Arizona Dept. of Economic Security, Research Administration, February 1992

Many analysts were anticipating a less-than-seasonal drop in retail trade jobs in January because stores did not increase at normal rates from October to December. An average drop for retail trade, then, may indicate employment losses in core staff. Most losses came in department stores (-5,600) and restaurants and bars (-1,200).

Services Employment Falls 1.1%

Services had an especially weak January with employers paring employment by 1.1 percent, or 4,600 jobs. Most losses were in business services (-2,000) and hotels (-800).

Hopes that construction employment would be buoyed by lower interest rates did not show up in January's employment estimates. Another 2,000 construction jobs were lost, albeit less than the seasonal norm.

Despite a surge in demand for refinancing mortgages, the finance industry was still losing jobs in January. The finance, insurance, and real estate (FIRE) group dropped 700 jobs over the month, and over the year FIRE was still down 500 jobs.

Manufacturing posted a seasonally average loss of 1,700 jobs in January. The industry as a whole has contracted almost 5 percent from a year ago, or 8,800 jobs. All of manufacturing's losses since January 1991 have been in durable goods. Of those, 6,900 were in the high-tech components of aircraft and missiles, and machinery manufacturing..

The good news in January was the rate of increase in Arizona's seasonally adjusted unemployment rate was down slightly from the more than one-point gains the previous two months. If the lingering effects of the national recession on Arizona are not at an end, it appears they are probably at least close to it.

Also, other economic indicators point to better times ahead, at least for some. Housing starts are beginning to climb, and homes have not been this affordable in years. In addition, interest rates are low, though mortgage interest rates recently began creeping up. That mortgage rates are beginning to rise in small increments may spur more buyers to enter the market, especially those who were waiting to see when rates hit bottom.

— Ron Simon,
RA Economic Analysis Manager

Table 1
Arizona Labor Force, Employment, and Unemployment Data, January 1992[a]

(in Thousands)

	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Monthly/Yearly Change: Dec. '91 - Jan. '92	Monthly/Yearly Change: Jan. '91 - Jan. '92
Total Civilian Labor Force[d]	1730.9	1727.5	1692.3	3.4	38.6
Total Unemployment	149.4	131.3	80.3	18.1	69.1
Unemployment Rate	8.6%	7.6%	4.7%	—	—
Unemployment Rate (Seasonally Adjusted)[e]	9.3%	8.4%	5.1%	—	—
Total Employment	1581.5	1596.2	1612.0	-14.7	-30.5
Total Wage and Salary Employment[f, g]	1496.7	1528.0	1478.8	-31.3	17.9
Private Sector	1219.7	1242.6	1215.8	-22.9	3.9
Government	274.0	285.4	263.0	-11.4	11.0
Goods-Producing Industries	261.6	265.4	270.6	-3.8	-9.0
Manufacturing	172.2	173.9	181.0	-1.7	-8.8
Total Durable Goods	128.2	129.3	137.1	-1.1	-8.9
Stone, Clay, and Glass	5.0	5.2	5.6	-0.2	-0.6
Primary and Fabricated Metals	13.7	14.0	14.3	-0.3	-0.6
Primary Metals	5.8	5.9	5.9	-0.1	-0.1
Fabricated Metals	7.9	8.1	8.4	-0.2	-0.5
Machinery	54.5	54.7	57.9	-0.2	-3.4
Aircraft and Missiles	24.4	24.6	27.9	-0.2	-3.5
Lumber and Wood Products (Excluding Furniture)	6.4	6.6	6.4	-0.2	0.0
Total Non-durable Goods	44.0	44.6	43.9	-0.6	0.1
Food and Kindred Products	10.3	10.5	9.8	-0.2	0.5
Printing and Publishing	15.5	15.6	15.9	-0.1	-0.4
Mining and Quarrying	13.9	14.0	13.2	-0.1	0.7
Copper Mining	11.5	11.5	10.7	0.0	0.8
Construction	75.5	77.5	76.4	-2.0	-0.9
Service-Producing Industries	1235.1	1262.6	1208.2	-27.5	26.9
Transportation, Communications, and Public Utilities	80.2	80.6	81.1	-0.4	-0.9
Transportation	46.2	46.5	46.3	-0.3	-0.1
Communications and Public Utilities	34.0	34.1	34.8	-0.1	-0.8
Trade	374.1	384.5	369.9	-10.4	4.2
Total Wholesale Trade	74.8	75.1	73.9	-0.3	0.9
Total Retail Trade	299.3	309.4	296.0	-10.1	3.3
General Merchandise and Apparel	49.9	55.5	48.4	-5.6	1.5
Food Stores	51.3	51.9	50.1	-0.6	1.2
Automotive and Service Stations	34.3	34.5	33.5	-0.2	0.8
Eating and Drinking Places	104.1	105.3	103.3	-1.2	0.8
Finance, Insurance, and Real Estate	91.6	92.3	92.1	-0.7	-0.5
Services and Miscellaneous	415.2	419.8	402.1	-4.6	13.1
Hotels and Lodging Places	39.7	40.5	39.6	-0.8	0.1
Business Services	86.2	88.2	80.3	-2.0	5.9
Health Services	107.7	106.8	104.2	0.9	3.5
Government	274.0	285.4	263.0	-11.4	11.0
Federal	45.3	45.7	44.1	-0.4	1.2

Notes and Source: See Table 3

Table 2
Maricopa County Labor Force, Employment, and Unemployment Data, January 1992[a]

(in Thousands)

	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Monthly/Yearly Change: Dec. '91 - Jan. '92	Monthly/Yearly Change: Jan. '91 - Jan. '92
Total Civilian Labor Force[d]	1057.6	1058.5	1050.6	-0.9	7.0
Total Unemployment	82.9	71.6	42.4	11.3	40.5
Unemployment Rate	7.8%	6.8%	4.0%	—	—
Unemployment Rate (Seasonally Adjusted)[e]	6.3%	7.2%	4.3%	—	—
Total Employment	974.7	986.9	1008.2	-12.2	-33.5
Total Wage and Salary Employment[f, g]	980.6	1001.2	979.2	-20.6	1.4
Private Sector	839.2	853.1	840.8	-13.9	-1.6
Government	141.4	148.1	138.4	-6.7	3.0
Goods-Producing Industries	179.8	182.1	187.5	-2.3	-7.7
Manufacturing	129.0	129.8	135.8	-0.8	-6.8
Total Durable Goods	97.5	98.2	104.8	-0.7	-7.3
Stone, Clay, and Glass	2.8	3.0	3.3	-0.2	-0.5
Primary and Fabricated Metals	9.4	9.5	10.0	-0.1	-0.6
Machinery	45.5	45.7	48.3	-0.2	-2.8
Total Non-durable Goods	31.5	31.6	31.0	-0.1	0.5
Food and Kindred Products	7.4	7.5	7.0	-0.1	0.4
Printing and Publishing	11.0	11.0	11.2	0.0	-0.2
Mining and Quarrying	0.8	0.8	0.7	0.0	0.1
Construction	50.0	51.5	51.0	-1.5	-1.0
Service-Producing Industries	800.8	819.1	791.7	-18.3	9.1
Transportation, Communications, and Public Utilities	55.8	56.1	58.9	-0.3	-3.1
Transportation	33.5	33.8	35.6	-0.3	-2.1
Communications and Public Utilities	22.3	22.3	23.3	0.0	-1.0
Trade	247.1	254.9	246.0	-7.8	1.1
Total Wholesale Trade	56.5	57.1	57.3	-0.6	-0.8
Total Retail Trade	190.6	197.8	188.7	-7.2	1.9
General Merchandise and Apparel	32.0	36.0	30.2	-4.0	1.8
Food Stores	32.9	33.2	32.5	-0.3	0.4
Automotive and Service Stations	21.1	21.3	20.7	-0.2	0.4
Eating and Drinking Places	67.4	67.8	67.0	-0.4	0.4
Finance, Insurance, and Real Estate	73.2	73.6	73.7	-0.4	-0.5
Services and Miscellaneous	283.3	286.4	274.7	-3.1	8.6
Hotels and Lodging Places	24.5	25.1	24.8	-0.6	-0.3
Business Services	69.8	71.5	65.1	-1.7	4.7
Health Services	69.8	68.8	67.6	1.0	2.2
Government	141.4	148.1	138.4	-6.7	3.0

Notes and Source: See Table 3

Table 3
Pima County Labor Force, Employment, and Unemployment Data, January 1992[a]

(in Thousands)

	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Monthly/Yearly Change: Dec. '91 - Jan '92	Monthly/Yearly Change: Jan. '91 - Jan '92
Total Civilian Labor Force[d]	320.2	320.1	306.4	0.1	13.8
Total Unemployment	19.4	16.8	10.7	2.6	8.7
Unemployment Rate	6.1%	5.2%	3.5%	—	—
Unemployment Rate (Seasonally Adjusted)[e]	6.5%	5.5%	3.7%	—	—
Total Employment	300.8	303.3	295.7	-2.5	5.1
Total Wage and Salary Employment[f, g]	263.0	267.8	252.2	-4.8	10.8
Private Sector	202.3	204.3	197.5	-2.0	4.8
Government	60.7	63.5	54.7	-2.8	6.0
Goods-Producing Industries	40.7	40.9	41.4	-0.2	-0.7
Manufacturing	24.2	24.4	25.5	-0.2	-1.3
Total Durable Goods	19.0	19.2	20.3	-0.2	-1.3
Total Non-durable Goods	5.2	5.2	5.2	0.0	0.0
Mining and Quarrying	2.4	2.4	2.3	0.0	0.1
Construction	14.1	14.1	13.6	0.0	0.5
Service-Producing Industries	222.3	226.9	210.8	-4.6	11.5
Transportation, Communications, and Public Utilities	10.7	10.6	9.1	0.1	1.6
Transportation	6.2	6.1	4.7	0.1	1.5
Communications and Public Utilities	4.5	4.5	4.4	0.0	0.1
Trade	62.6	63.9	61.4	-1.3	1.2
Total Wholesale Trade	9.1	9.0	8.7	0.1	0.4
Total Retail Trade	53.5	54.9	52.7	-1.4	0.8
General Merchandise and Apparel	7.9	8.8	8.1	-0.9	-0.2
Food Stores	8.2	8.4	8.0	-0.2	0.2
Automotive and Service Stations	5.7	5.5	5.4	0.2	0.3
Eating and Drinking Places	18.8	19.3	18.8	-0.5	0.0
Finance, Insurance, and Real Estate	11.6	11.7	11.4	-0.1	0.2
Services and Miscellaneous	76.7	77.2	74.2	-0.5	2.5
Hotels and Lodging Places	6.8	6.8	6.8	0.0	0.0
Business Services	12.0	12.3	10.8	-0.3	1.2
Health Services	23.0	23.1	22.4	-0.1	0.6
Government	60.7	63.5	54.7	-2.8	6.0

Notes:
a) Data on labor force, total unemployment, total employment, and seasonally adjusted unemployment rate should not be used for economic-assistance programs. Data for conomic-assistance programs are available by contacting DES, Research Administration
b) Preliminary and subject to revision following month
c) Revised
d) Adjusted to Current Population Survey (CPS) to reflect place of residence
e) Normal seasonal variations have been eliminated to reflect underlying trends
f) By place of work; does not include agricultural workers, self-employed, unpaid family members, and domestic workers
g) Detail may not add up correctly due to rounding
h) Rounded to the nearest one-quarter

Source: *Prepared by the Arizona Dept. of Economic Security, Research Administration, in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics, February 1992*

Table 4
Non-metropolitan Counties' Labor Force, Employment, and Unemployment Data, January 1992[a,b]

	Apache	Cochise	Coconino	Gila	Graham	Greenlee	La Paz
Total Civilian Labor Force[d]	16,250	35,900	43,625	13,850	7,775	3,375	6,200
Total Unemployment	3,325	3,950	5,375	2,050	875	325	875
Unemployment Rate	20.5%	11.0%	12.3%	14.8%	11.4%	9.9%	14.1%
Unemployment Rate (Seasonally Adjusted)[e]	21.4%	11.1%	11.3%	14.3%	11.1%	9.9%	13.8%
Total Employment	12,925	31,950	38,250	11,800	6,900	3,050	5,325
Total Wage and Salary Employment[f,h]	14,925	26,000	39,700	11,825	4,825	3,375	3,625
Private Sector	9,000	15,050	26,975	8,950	3,025	2,850	2,575
Government	5,925	10,950	12,725	2,875	1,800	525	1,050
Goods-Producing Industries	700	2,250	4,425	3,375	400	2,300	550
Manufacturing	475	1,200	2,975	1,525	200	25	200
Mining and Quarrying	25	100	175	1,200	0	1,950	75
Construction	200	950	1,275	650	200	325	275
Service-Producing Industries	14,225	23,750	35,275	8,450	4,425	1,075	3,075
Transportation, Communications, and Public Utilities	1,675	1,525	2,525	450	175	50	175
Trade	1,550	5,500	9,950	2,575	1,475	300	1,175
Finance, Insurance, and Real Estate	350	650	700	250	100	25	125
Services and Miscellaneous	4,725	5,125	9,375	2,300	875	175	550
Government	5,925	10,950	12,725	2,875	1,800	525	1,050

	Mohave	Navajo	Pinal	Santa Cruz	Yavapai	Yuma
Total Civilian Labor Force[d]	39,075	27,800	38,250	12,250	41,325	67,350
Total Unemployment	4,900	4,775	4,750	1,775	4,225	9,875
Unemployment Rate	12.6%	17.2%	12.4%	14.5%	10.2%	14.7%
Unemployment Rate (Seasonally Adjusted)[e]	12.2%	17.1%	13.1%	20.9%	9.7%	24.7%
Total Employment	34,175	23,025	33,500	10,475	37,100	57,475
Total Wage and Salary Employment[f,h]	26,950	20,625	30,700	11,500	28,050	31,175
Private Sector	22,275	14,400	21,275	9,650	22,250	23,150
Government	4,675	6,225	9,425	1,850	5,800	8,025
Goods-Producing Industries	5,150	3,500	8,800	1,275	5,400	3,250
Manufacturing	2,575	1,650	3,025	950	2,350	1,675
Mining and Quarrying	50	1,075	5,125	0	1,075	25
Construction	2,525	775	650	325	1,975	1,350
Service-Producing Industries	21,800	17,125	21,900	10,225	22,650	27,925
Transportation, Communications, and Public Utilities	1,425	1,525	1,025	750	1,025	1,375
Trade	8,400	4,275	5,700	5,525	7,675	10,150
Finance, Insurance, and Real Estate	1,200	500	625	275	950	1,125
Services and Miscellaneous	6,100	4,600	5,125	1,825	7,200	7,250
Government	4,675	6,225	9,425	1,850	5,800	8,025

Notes and Source: See Table 3

Table 5

Estimated Hours and Earnings of Production Workers, by Selected Industry Groups, January 1992[a]

Arizona

Industry	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991
Manufacturing	$440.78	$451.94	$424.44	40.7	41.5	40.5	10.83	10.89	10.48
Aircraft and Missiles	653.05	692.85	657.39	45.1	46.5	46.1	14.48	14.90	14.26
Food and Kindred Products	335.54	335.51	355.68	37.2	38.3	38.0	9.02	8.76	9.36
Primary Metals	460.18	479.20	494.76	39.5	39.9	38.0	11.65	12.01	13.02
Machinery	451.07	457.47	401.39	40.6	41.4	39.9	11.11	11.05	10.06
Copper Mining	634.30	638.55	642.54	42.4	43.0	44.1	14.96	14.85	14.57
Construction	444.28	433.78	435.55	36.9	36.3	37.1	12.04	11.95	11.74
Public Utilities	778.30	813.03	772.47	42.6	43.9	44.6	18.27	18.52	17.32
Retail Trade[d]	272.00	275.33	250.85	32.0	32.7	31.2	8.50	8.42	8.04
Wholesale Trade	398.91	414.00	395.90	38.1	38.8	38.4	10.47	10.67	10.31

Maricopa County

Industry	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991
Manufacturing	$459.89	$476.15	$446.48	41.1	42.4	40.7	11.17	11.23	10.97
Construction	464.62	454.11	462.00	36.7	36.3	37.9	12.66	12.51	12.19
Retail Trade[d]	290.83	296.14	258.71	33.2	34.0	31.9	8.76	8.71	8.11
Wholesale Trade	417.70	429.66	427.48	38.9	39.6	38.1	10.74	10.85	11.22

Pima County

Industry	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991	Jan. 1992[b]	Dec. 1991[c]	Jan. 1991
Manufacturing	$433.61	$429.87	$389.38	41.1	40.1	38.4	10.55	10.72	10.14
Construction	389.79	384.13	382.67	36.6	35.8	35.4	10.65	10.73	10.81
Public Utilities	658.79	668.95	627.74	41.2	42.5	41.6	15.99	15.74	15.09

Notes: a) Estimates are based on a sample of full- and part-time production and related workers whose payroll and hours are reported for the pay period that includes the 12th of the month
b) Preliminary and subject to revision following month
c) Revised
d) Excludes eating and drinking places

Source: *Prepared by the Arizona Dept. of Economic Security, Research Administration, in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics, February 1992*

State Expected to Have Moderate Growth

(Continued from page 6)

new jobs in the rural counties the next two years. These three major industry groups account for three-fourths of all non-farm payroll employment in the non-metro counties and will add a combined 6,000 jobs in 1992 and 6,400 jobs in 1993.

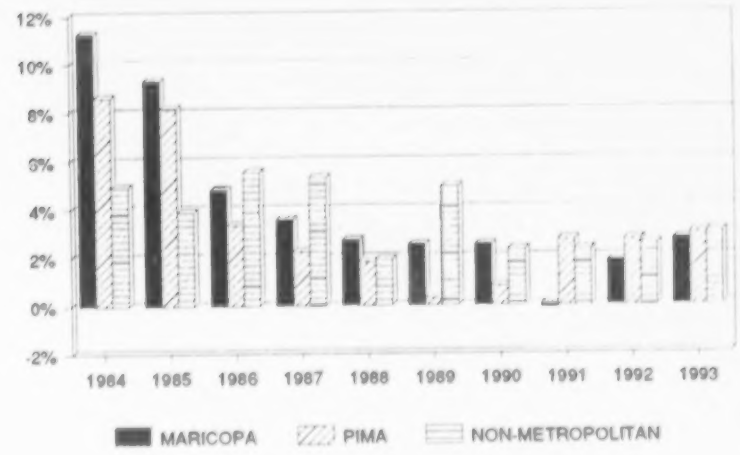
Mining employment increased by 1,000 in 1991, the direct result of job gains in copper mining. And stable copper prices over the forecast period will continue to generate employment opportunities in the copper mining industry. RA expects to see an additional 500 mining positions created in both the 1992 and 1993 forecast years.

The manufacturing, construction, and FIRE industries in the non-metro counties are each expected to show job losses in 1992. But manufacturing and construction should turn around and have positive job growth in 1993 while FIRE is expected to see little change.

Total unemployment, as is the case statewide, is expected to grow faster than total employment in 1992, pushing up unemployment rates in the non-metro counties by an overall average of 1.4 percentage points. An expected decline in total unemployment in 1993, however, should help lower the rural counties' average jobless rates to slightly lower levels.

Figure 5

Metropolitan Counties' vs. Non-metropolitan Counties' Wage and Salary Employment Growth Rates, Actual (1984-1991) and Projected (1992, 1993)



Source: Arizona Dept. of Economic Security, Research Administration, February 1992

— Dennis Doby
RA Economist

U.S. Economy Will Affect Arizona's Fate

(Continued from page 2)

a modest 2.3 percent in 1992, before picking up to 3.2 percent in 1993. The result is expected sluggish growth for Arizona in the first half of 1992, with both the national and Arizona economies picking up in the second half of the year and through 1993.

Some of WEFA's other national economic predictions expected to impact the U.S. and Arizona economies include:

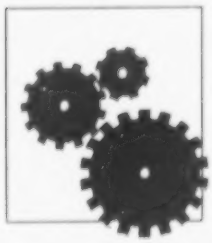
- a U.S. monetary policy geared toward lowering short-term interest rates, if there are renewed signs of economic deterioration. Only after recovery takes a firm hold and inflation shows signs of bottoming out, will the Federal Reserve gradually nudge the federal funds rate higher.
- continued declines in real defense spending over the next three years.
- expected higher employment growth starting in the second quarter of 1992, helping to solidify workers' income gains. Once employment growth picks up, workers will be able to sustain close to 3 percent growth in consumption and modestly increase their savings.
- relatively low mortgage interest rates and release of pent-up demand for single family homes, which are expected to sustain the housing recovery. Tight lending policies by banks and an overbuilt multi-family sector will make the current expansion less robust than previous expansions.
- a gradual increase in business investment. As the recovery continues, rising capacity utilization will provide support for continuing equipment outlays by business.

— DES, Research Administration

Phoenix Manufactured-Housing Company Expected to Benefit from Soviet Break-Up

"New Developments" is featured each month as a service to our readers. This section is a compilation of public announcements and articles from newspapers and periodicals about events significant to Arizona labor markets. Due to space limitations, however, an exhaustive list of business news is not possible. In addition, the Arizona LMI Newsletter is not responsible for incorrect information reported by these sources.

MANUFACTURING — An end of the Cold War may mean a heating up of employment opportunities for one Valley manufacturer. **CAVCO Industries Inc.** of Phoenix is expected to sign an agreement in May to **make 5,000 prefabricated homes** to house members of the military of the Commonwealth of Independent States — formerly the Soviet Union — recalled from East Germany and the Baltic nations. The estimated $50-$75 million contract **could lead to at least an additional 400 positions** at CAVCO, a company official said.



Boeing Co. has awarded a multi-million dollar contract to **Aircraft Gear Corp. of Chandler** to produce flap transmissions for the Seattle company's new 777 jetliner. Once production is under way, Aircraft Gear is expected to **increase employment by about 15 percent.** The company currently employs about 80 people.

As part of a corporate restructuring plan, Allied-Signal Aerospace Co. continues to make changes in its Garrett divisions in Phoenix, **combining Garrett Engine and Garrett General Aviation Services** into one unit in January. The move is expected to **lead to more layoffs**. Both divisions have cut back employment in recent months, while employment at all of Garrett's Valley operations has dropped from about 13,000 to 10,000 in the past year.

Space Data, a Chandler company that makes products that help propel rockets into space, has been **boosting its employment** of late, thanks to a contract with the government's Strategic Defense Initiative (SDI) program. Space Data, a subsidiary of Orbital Sciences Corp. of Fairfax, Va., has been adding about 30 employees a month to its payroll — primarily engineers and technicians. The company, which is expected to grow about 40 percent this year, employed about 650 workers as of early February.

CONSTRUCTION — Two recently announced projects on the Navajo Indian Reservation should create employment opportunities for the Indian population. First, **Indian Health Services** said its plans to **build a $50-$75 million Fort Defiance Comprehensive Health Care Facility**, expected to open in five years. The new 58-bed hospital, which will replace an existing facility, will offer a wide range of services for Indians and emergency medical service for the general public. The second project, which is unrelated, will include the building of a **100-room hotel near the Canyon de Chelly National Monument**. Ocean Properties Ltd. will build and manage the property, which will create 120 construction jobs and 100 permanent positions in Chinle once the hotel is built.

NEW DEVELOPMENTS

A major Arizona developer of retirement housing is planning a **5,500-home community in Goodyear** with a projected population of 10,000. **Robson Communities**, which has developed projects such as Sun Lakes in the east Valley, has already begun work on one of three golf courses planned for the $700 million, 2,200-acre project called Pebble Creek. The first homes in Pebble Creek — bounded by Camelback and Thomas roads, and Bullard and Sarival avenues — are expected to be available in the fall.

TRADE — A Phoenix computer mail-order and retail business that has seen its sales grow from $1 million to $100 million in the past five years plans to **expand its product line**. **Insight Distribution Network Inc.** of Tempe, which has focused on computer hardware, now plans to sell software products. Employment at Insight has grown to 200, and the company now ranks 32nd on Arthur Andersen's list of the largest privately held companies in Arizona.

Phoenix-based **Circle K Corp.** has **started closing 86 convenience stores** in 11 states — including nine in Arizona — as part of a plan to shut down 600 locations by summer and eventually 1,600 locations. Currently under bankruptcy protection, Circle K had nearly 4,700 stores in mid-1989, but was down to about 3,800 before the current round of closures.

Another Phoenix company that has had financial difficulties, **Sun Valley Waterbeds**, has made agreements with its creditors and is **coming out of U.S. Bankruptcy Court protection**. Under new management, Sun Valley currently is operating 35 stores and employs 250 people in Arizona and five other states. Before its problems, the Phoenix company had 81 stores and 700 employees in eight states.

SERVICES — The **Colorado Rockies** professional baseball team will **play its spring-training games in Tucson** when it begins its first National League season in 1993, the club announced. The Colorado team will fill a void being left by the Cleveland Indians, who will begin training in Homestead, Fla., next year. The Rockies signed a multi-year deal to play at Hi Corbett Field (the Indians' home), but a new Tucson stadium will be built for the Rockies within the next several years.

State Commerce Department Adds 'Enterprise Zones' in Phoenix, Tucson

Following are brief stories relating to labor issues affecting the nation and Arizona.

The state's Commerce Department announced in February the addition of two new "enterprise zones" in Arizona, one each in Phoenix and Tucson. The enterprise-zone designation allows companies that expand or relocate into those areas up to $5,000 in state income tax credits for hiring disadvantaged workers if those employees meet certain criteria. State enterprise zones are available in 11 areas in the state.

The new enterprise zone in Phoenix is roughly bounded by the Hohokam, Maricopa, and Papago freeways, and 35th Avenue. The central core of Phoenix, however, is excluded. In Tucson, the enterprise zone includes a 43-square-mile area near Tucson International Airport, including the Hughes Aircraft Co. plant and International Business Machines complex. Each city now has two enterprise zones.

To qualify as an enterprise zone, an area must have unemployment or poverty levels 150 percent above the statewide average for the previous two years. To qualify for tax credits, 35 percent of a company's workforce must be made up of persons in federal job-training programs or whose income falls below the poverty level. Besides tax credits, an enterprise-zone designation can also help compnies obtain quicker handling of building permits and access to job-training programs.

The Commerce Department can name up to six areas a year as enterprise zones with a designation lasting up to a maximum of five years. Counties with a population of 500,000 or less can apply to have the whole county designated as an enterprise zone. The state's other enterprise zones include the following areas: all of Yuma, Santa Cruz, Pinal, Greenlee, and Navajo counties; Huachuca City in Cochise County; and a portion of downtown Tempe.

Currently, there is no detailed information available on the number of jobs that have been created by the 2½-year-old program, says Mobin Qaheri, the state's enterprise-zone administrator. But an annual report to the Governor, due out in a couple of months, is expected to provide some employment estimates, and a recent article in *The Phoenix Gazette* said an enterprise zone in south Phoenix has helped create 220 jobs.

Information on the enterprise-zone program is available by contacting the Commerce Department at 280-1321.

NEWS IN BRIEF

Phoenix-based **AutoCare Corp. has purchased 14 Pit Stop Auto Care Centers** in Maricopa County and will operate them under the name of **Spee-Dee Oil Change & Tune-Up**. AutoCare expects to add another 16 locations in the Valley over the next three years. SpeeDee Oil Change & Tune-Up stores are part of a franchise based in Metairie, La.

Several **Valley hotel projects have been put on hold or have been slowed down** because of the recession. A $100 million resort at an unspecified site, planned by Guinness Enterprise Holdings of New York City, has been put off indefinitely; a 250-room Four Seasons Resort, to be developed at Troon North in Scottsdale, is still in the early stages of design; and construction of a 1,050-room Scottsdale resort, planned by Herberger Enterprises Inc. of Scottsdale and Woodbine Development Corp. of Dallas, is now four to six years away.

TRANSPORTATION, COMMUNICATIONS and PUBLIC UTILITIES — **American Telephone & Telegraph Co. laid off 107 production workers** at its Phoenix wire and cable factory in February because of declining sales, the company said. It's the second such layoff for AT&T in the past six months. AT&T, which still has about 1,700 employees at its Phoenix plant, laid off 120 workers last fall.

MISCELLANEOUS — **Four companies will receive $1 million in low-interest loans** from the state for relocating or expanding businesses that are expected to **create about 100 jobs**, primarily in rural Arizona. Eurofresh of Ringgold, Pa., will receive a $400,000 loan from the Commerce and Economic Development Commission to start a 10-acre greenhouse near Willcox, expected to employ 40 people; $300,000 will be loaned to Yavapai Block of Prescott to help pay for relocation, which already generated 10 to 15 jobs; a $250,000 loan was given to Monsey Products Co. of Kimberton, Pa., to build a 40,000-square-foot, roof-coating and wallboard plant in Kingman that is expected to employ 30 people by 1994; and a $76,000 loan was given to Signature Industries Inc. of Phoenix, a wholesale furniture manufacturer, that is expected to lead to 16 new jobs.

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